Brazilian Medical Devices Market: Investment Opportunities, Growth Forecasts by Care Areas and Local Competitive Landscape (2015-2018)

Description:

Amidst political unrest and nationwide protests in 2013, Brazilian economy has been plummeting. Even as the average citizens remain dissatisfied with poor public healthcare quality, high level of corruption and sizeable portion of taxes being veered for global sporting events; Brazil's economic landscape portrays an ambiguous picture. With dipping economic indicators on one hand and further inflow of foreign investments on the other, the purpose of the report is to analyze the key opportunities and investment areas for medical devices in Brazil. With data gathered through in-depth primary research with various local and global medical device manufacturers as well as distributors, the report provides a detailed understanding of the Brazilian medical device market from 2015-2018 by care areas. In addition to comprehensive market metrics and growth forecasts for over 30 medical device product categories, the report analyzes the key opportunity areas for foreign investors in Brazilian medical device market. The report is relevant for key stakeholders and decision makers in medical device organizations, venture capital and private equity firms; strategy consulting firms; as well as government, trade and commerce organizations.

Key Highlights and Questions Answered in the Report

- How is the current political, economic, social and technological environment in Brazil for foreign investors?
- With relaxed FDI policies on one hand and dwindling economy on the other, how will the market behave for foreign investors in healthcare and medical devices segment?
- While the quality and infrastructure at public hospitals has been declining, how does the government plan to relay and spend healthcare budgets for next few years?
- What are the business prospects for foreign investors looking to do business in Brazil in the near future?

With long waiting lines, outdated medical equipment and poor quality of services; Brazilian public hospitals have been a topic of opprobrium. In a recent poll commissioned by the National Council of Medicine, over 87% of the population using public hospitals conveyed dissatisfaction. Private healthcare sector in Brazil has been growing steadily. Benefitted by new middle class, rising living standards, higher disposable income and increased rate of urbanization demand for private hospitals and health insurance is expected to surge.

- What are the various types of hospitals and healthcare facilities across Brazil?
- What are the key customer segments, their opportunities and challenges for commercialization of medical devices in Brazil?
- What is the installed base of selected diagnostic imaging modalities in the country?
- What are the key opportunities for medical device manufacturers by disease areas including cardiovascular, cancer and other disease types?
- What are the key opportunities and need-gaps in the Brazilian private health sector for various healthcare service providers?
- What are the trends in public and private health insurance in Brazil?
- What is the procurement cycle for medical devices and consumables at private as well as public hospitals?

Brazil possesses robust domestic manufacturing capabilities. With just over 50% of Brazil's medical devices industry being dependent on imports, most low-end and mid-range devices are typically produced in Brazil. Moreover, owing to the country's proximity to neighboring Latin American countries, many medium sized companies have begun tapping the unaddressed opportunity.

- What is the current market size for medical devices by various product categories and care areas?
- How will the declining economic indicators, yet growing investment in healthcare impact market projections for various product categories?
- What are the opportunities for medical device manufacturers by various care areas including cardiology, critical care, operating room, diagnostic radiology, orthopedics, dialysis etc.?
- What are the key opportunities for manufacturers of diagnostic imaging equipment?
- What are the key differentiators for individual product categories being consumed across various care areas in Brazil?
- What are the purchase criteria for medical devices in public hospitals as well as private hospitals?
- What are the current guidelines for medical device registration in Brazil?
Despite favorable business environment and support from the government, Brazil’s domestic production industry largely focuses on low-end to mid-range devices. While over 1,700 local manufacturing companies contribute to the domestic production, orthopedic and dental products dominate this segment. However, the scenario is expected to change. With thorough understanding of Brazil’s healthcare market and strategic location in Latin America, many multinational companies with long term vision have been looking for strategic partnership with local firms. Even as government initiatives have been bolstering the country’s export business, many MNCs have been looking to establish localized manufacturing units in Brazil.

- Who are the key global manufacturers of medical devices operating in Brazil?
- What are the key market penetration strategies adopted by selected market participants in Brazil?
- Who are the key local medical device manufacturers?
- What are the key hospital dynamics and new hospital launches in 2014-2015?
- What are the various healthcare policies from 2014-2015 that are likely to impact the medical device market in Brazil?

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